



HIGHER EDUCATION STRATEGIC ENERGY MANAGEMENT



focus on energy[®]

Partnering with Wisconsin utilities



HOW TO APPLY

NEED HELP? CALL 888.623.2146

FOCUS ON ENERGY® Higher Education Strategic Energy Management (SEM) provides technical support and financial incentives for higher education institutions interested in moving beyond project-by-project energy savings. The objective is to advance energy-management capabilities and establish a continuous energy-management improvement process resulting in low- and no-cost operational energy improvements. This offering is most impactful for organizations with a continuous improvement culture, an established Energy Team and an annual strategic plan for energy management.

UNDERSTANDING SEM

SEM is a long-term approach to managing energy. Key elements to being successful with SEM include goal setting, progress tracking, and reporting. A linear regression-based energy model capturing the performance impacts of occupancy trends, weather, and other industry-specific variables is the foundation for building a customized energy-management plan through SEM. Enrolled customers are eligible to receive financial incentives for validated energy improvements attributed to SEM, which are not otherwise eligible for Focus on Energy incentives.

“*Focus on Energy's SEM offering has made a positive impact in the way we've saved energy over the past two years at Ripon College. The tools and strategies have expanded our knowledge and allowed us to continue and work toward our end goal. It has been, overall, a great experience.*”

- **Keith Lauth, Assistant Director of Physical Plant, Ripon College**

WHY PARTICIPATE IN SEM

- Enrollment incentive of \$1,500
- Energy performance model and tracking tools
- Energy management system development support
- Energy savings incentives up to \$50,000

ELIGIBILITY REQUIREMENTS

Enrollment in SEM is required to qualify for incentives for low- and no-cost projects. Projects started prior to acceptance into SEM will not be eligible for incentives.

SECTION 1

BEFORE YOU APPLY

- Confirm your gas and/or electric utility participates in Focus on Energy at focusonenergy.com/utilities.
- Contact your Focus on Energy Advisor for assistance. If you do not know who your Energy Advisor is, call **888.623.2146**.

SECTION 2

WHAT YOU'LL NEED

- SEM Enrollment application (all sections of this form must be completed).
- Identified Executive Sponsor and Energy Champion.
 - Executive Sponsor – The highest-level manager available at the facility (typically the facility manager) who is responsible for ensuring the Energy Team has the resources it needs for successful participation in SEM.
 - Energy Champion – Individual responsible for the success of SEM at the facility. This individual is responsible for coordinating with their Focus on Energy Coach and internally with facility staff, such as the Energy Team and Executive Sponsor.
 - Focus on Energy Coach – Program representative working directly with the customer to support meeting SEM objectives, including but not limited to, documenting SEM progress and supporting the modeling and documentation of energy savings.
- Daily energy-use data for the past 36 months.

SECTION 3

UNDERSTANDING YOUR INCENTIVE RATE AND OFFERING REQUIREMENTS

- Customers will receive an enrollment incentive of \$1,500 (50% upon enrollment and 50% at the end of the 12-month period).
- Enrolled customers qualify for an incentive of \$0.02/kWh and \$0.20/therm saved on validated energy improvements.
- Customers are limited to \$50,000 in SEM incentives over a 12-month period (in addition to the \$1,500 enrollment incentive).
- Eligible projects are limited to those not otherwise eligible for prescriptive or custom incentives through Focus on Energy.
- Customers must be willing to share daily energy data on a monthly basis.
- Customers must be able to commit necessary resources to achieve the participation expectations listed in Section 5.



SECTION 4

SUBMIT ENROLLMENT APPLICATION

- Enrollment approval is contingent upon the receipt of necessary documentation, including the enrollment application and energy data.
- Submit your completed enrollment application to **business@focusonenergy.com** or to your Energy Advisor.
- Customers will be notified in writing of their approved enrollment and will work with their Focus on Energy Coach to move forward in the participation process.

SECTION 5

PARTICIPATION REQUIREMENTS

- Support the preparation of a regression-based energy model and corresponding performance tracker.
 - Provide Focus on Energy with energy-consumption data and requested business variables.
 - Energy-model results and the performance tracker will be reviewed with the customer prior to the kickoff meeting.

- Hold an on-site SEM kickoff event with Focus on Energy.
 - Review the energy model and performance tracker with the Energy Team.
 - Establish an initial list of energy opportunities.
 - Develop an Action Plan for achieving participation milestones.
- Implement the Action Plan.
 - Participate in monthly meetings with Focus on Energy to review the performance tracker.
- Earn savings and incentives.
 - Receive an incentive of \$0.02/kWh and \$0.20/therm saved, up to \$50,000 in a 12-month period.
- Reapply.
 - Upon successful completion of the first 12 months of milestones, customers may re-enroll, and continue their SEM journey.

Milestone	Frequency or Achievement Date
Hold a 30-60-minute virtual meeting with Focus on Energy SEM Team	Monthly
Develop an opportunities register	Second Month
Participate in an SEM gap analysis	Third Month
Complete an energy accounting of major equipment and uses	Fourth Month
Complete a process operational control review	Fifth Month
Deliver progress updates to the executive sponsor	Every Six Months
Identify an operational energy-savings opportunity	Sixth Month
Implement an operational energy-savings measure	Ninth Month
Measure progress addressing gaps in SEM gap analysis	Twelfth Month

HIGHER EDUCATION SEM ENROLLMENT

FOR PROJECTS ENROLLED BY 12/31/2022

SECTION 1

ACCOUNT AND CUSTOMER INFORMATION

Tax Identification Number (Check one) FEIN or SSN

If you use a Social Security Number (SSN) as your tax identification number, **do not provide it below.** You will be contacted by the Program via email to provide a copy of your W-9 using a secure online portal, if it is not already on file. **You must list an email address in Section 3.)**

FEIN

BUSINESS CLASSIFICATION OF CUSTOMER

(Check one. Required for all businesses, including non-profits.)

- Sole Proprietorship Individual Single-Member LLC
 C Corporation S Corporation Partnership
 Limited Liability Company - C Corp C
 Limited Liability Company - S Corp
 Limited Liability Company - Partnership
 Other _____

OWNER NAME (REQUIRED IF SSN IS USED AS TAX IDENTIFICATION NUMBER)

COMPANY NAME

LEGAL ADDRESS (AS SHOWN ON COMPANY W-9)

CITY STATE ZIP

SECTION 2

PARTICIPATING SITE INFORMATION

(Refer to your utility bills for account numbers below.)

PARTICIPATING ADDRESS

CITY STATE ZIP

ELECTRIC UTILITY AT SITE ELECTRIC ACCOUNT #

GAS UTILITY AT SITE GAS ACCOUNT #

- Site Address is same as Legal Address
 Site Address is different (complete below)

OTHER ENERGY USED

APPROXIMATE ANNUAL KWH

APPROXIMATE ANNUAL THERMS

SECTION 3

PAYMENT INFORMATION

Check will be payable to Customer unless otherwise noted. Payee is responsible for any associated tax consequences.

Mail check to:

- Customer Address
 Site Address
 Alternate Address (complete below)

COMPANY NAME

ADDRESS

CITY STATE ZIP

ATTENTION TO (OPTIONAL)



SECTION 4

CUSTOMER CONTACT INFORMATION

EXECUTIVE SPONSOR (DECISION MAKER)

NAME _____

TITLE _____

EMAIL _____

PHONE _____

SIGNATURE _____ DATE _____

ENERGY CHAMPION (DAY-TO-DAY CONTACT)

NAME _____

TITLE _____

EMAIL _____

PHONE _____

SIGNATURE _____ DATE _____



By signing this agreement, I demonstrate my alignment with the objectives of this offering, and I pledge to support the SEM efforts at this site. By signing this agreement, I also provide my permission for my electric and gas utility(ies) to share my energy data directly with Focus on Energy.

CUSTOMER SIGNATURE _____

NAME (PRINT) _____ DATE _____

Submit your completed application and supporting documentation to business@focusenergy.com.



PARTICIPATION REQUIREMENTS

Before you start your project, make sure you are familiar with participation requirements, program information, and Terms and Conditions.

INFORMATION AND REQUIREMENTS

General Terms and Conditions

Review the Focus on Energy Terms and Conditions at focusonenergy.com/terms or call **888.623.2146** to request a copy.

Incentive Limits

Business Programs: Incentives are limited to \$300,000 per project and \$400,000 per customer per calendar year for all Focus on Energy incentives (prescriptive and custom).

Depending on your business tax classification, you may receive IRS form 1099 for incentives totaling more than \$600 in a calendar year.

Trade Ally Information

A Trade Ally represents the company who provided/installed the equipment for a project or performed the service for which a customer is seeking an incentive. Trade Allies who have signed an agreement with Focus on Energy are allowed to enjoy certain program benefits, one of which is to receive direct payment of incentives at the Trade Ally's request. Incentives can only be paid directly to a registered Trade Ally who has a W-9 on file with Focus on Energy.

For more information on becoming a registered Trade Ally, visit focusonenergy.com/tradeally.

The Federal Employer Identification Number (FEIN) and Business Classification of the Trade Ally is required IF you received your incentive as a credit on your invoice whereby the incentive is paid directly to the Trade Ally. In this scenario, the credit must be clearly labeled as the Focus on Energy incentive and deducted from the amount due.

If your project was completed by more than one Trade Ally (example, equipment was purchased from one Trade Ally but installed by another Trade Ally) and the incentive is being paid to you the customer, please enter the information of the Trade Ally who installed your equipment in the Section 4: Trade Ally Information section. If the equipment was self-installed, please enter the information of the Trade Ally from whom you purchased the equipment.

Focus on Energy Information

Focus on Energy works with eligible Wisconsin residents and businesses to install cost-effective energy-efficiency and renewable-energy projects. Focus on Energy information, resources and financial incentives help projects that otherwise would not get completed or to complete projects sooner than scheduled. Its efforts help Wisconsin residents and businesses manage rising energy costs, promote in-state economic development, protect our environment, and control the state's growing demand for electricity and natural gas.

For more information, call **888.623.2146**
or visit focusonenergy.com.



REDUCING ENERGY WASTE ACROSS WISCONSIN

Focus on Energy, Wisconsin utilities' statewide program for energy efficiency and renewable energy, helps eligible residents and businesses save energy and money while protecting the environment. Focus on Energy information, resources, and financial incentives help to implement energy efficiency and renewable energy projects that otherwise would not be completed.

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